



Where's Debbie?

How consumers influence each other and practical steps brands can take to understand and harness **word of mouth**.



MediaLab

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Management Summary

Word of mouth is acknowledged to be one of the strongest drivers of marketplace influence. Yet it remains an enigma for marketers. Two tensions exist:

1. Against a phenomenon of mass impact, marketing response is frequently peripheral: mainstream communications carries on largely unabated whilst a marginal budget is allocated to 'viral marketing'.
2. Intuitively accessible theories on how word of mouth works do not connect with research methodologies which allow for accountable planning, implementation and evaluation of word of mouth strategies.

To try to resolve these tensions, MediaLab, the research division of Mediaedge:cia UK, has undertaken a major research project to understand the nature of word of mouth. We have looked across a range of different consumer categories and aimed to identify *who* engages most in word of mouth, *how* they differ in their use of the category, *what* opportunities there are to reach them and *whether* they are likely to be responsive.

The project uses a simple, transferable, four-question methodology to identify, by category, those who are active in word of mouth. We call these people *Transmitters*.

Applying this methodology across a range of categories and survey types we report that:

1. Different categories have different transmitters
2. The majority of the population are transmitters in at least one category
3. By category, transmitters are:
 - Involved – being heavier users, aware of and using more brands, more motivated by brand relative to price
 - Expert – they express stronger opinions, are more demanding of the category and actively recommend. Crucially, they have differentiated needs of the category which provide a potential lever for driving word of mouth.
 - Responsive to communications – they are generically more positive about branded communications across a range of channels, more internet active and in pilot studies demonstrate higher advertising awareness.
 - Accessible in depth – their involvement with the category extends through to their consumption of category-orientated "media" in the widest sense.

We conclude therefore that word of mouth is within reach of marketers, but that a different strategic approach is required.

Of primary importance is a shift in perspective: word of mouth needs to become a philosophy – part of everything rather than a stand alone activity.

There is then a range of opportunities to drive word of mouth through a combination of:

- Targeting – because of *transmitters'* direct significance as well as indirect influence
- Augmenting the message mix – to acknowledge transmitters' differentiated needs
- Encouraging engagement – because transmitters desire to interact with the category

As an enabler of this, marketers should review current research programmes to identify opportunities to define and analyse category transmitters.

"I'm looking for those Dairy Lea Lunchables because my friend Debbie told me there was an offer..."^a



Where's Debbie?

Introduction

Word of Mouth may not be a new phenomenon, but it has become a hot topic for marketers. Provocative statistics suggest the predominance of word of mouth and the relative impotence of advertising; new labels such as buzz and viral enter the marketing lexicon; agencies launch or re-position.

Yet word of mouth remains an enigma: it is central to the success of brands but frustratingly intangible to marketing practitioners.

To try to square this circle, MediaLab, the research division of Mediaedge:cia UK, has undertaken a major research project to understand the nature of word of mouth. We have looked across a range of different consumer categories and aimed to identify *who* engages most in word of mouth, *how* they differ in their use of the category, *what* opportunities there are to reach them and *whether* they are likely to be responsive.

- We conclude that word of mouth is within reach of marketers.
- We demonstrate that it is possible to identify, by category, an audience who are active in word of mouth. We call these people *Transmitters*.
- We further demonstrate that *Transmitters* are accessible with a wide range of marketing channels.
- There are actionable implications for targeting, message-mix and channel-planning – both at the strategic and implementation level.

This document summarises the findings.



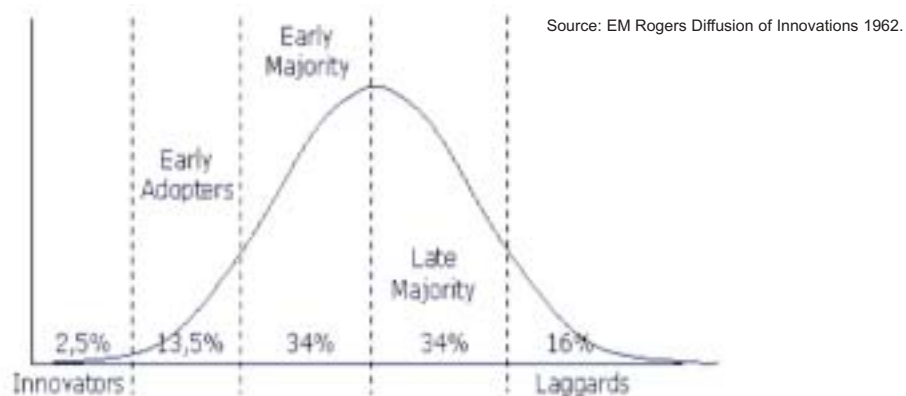
"Word of mouth"

^a Source: Taken from ethnographic work by Everyday Lives. The quote is taken from their 'co-discovery' technique where consumers – in this case a housewife in a supermarket - are filmed and then subsequently asked to comment on what it was they were doing. See www.edlglobal.net

A Brief History of Word of Mouth

Ever since Eve introduced Adam to the apple, word of mouth has been a significant driver of consumer behaviour.

The standard text-book for marketers and social scientists alike is Everett Rogers' *Diffusion of Innovations*¹. First published in 1962 and now in its fifth edition, every agency planner has on more than one occasion used the now classic bell curve of 'adopters in society' (see Fig 1 below) with its familiar labels of 'innovators', 'early adopters' and so on through to the impervious 'laggards'.



In his best-selling book, *The Tipping Point*², Washington Post writer Malcolm Gladwell uses examples from history including the American war of independence to illustrate the idea that different types of people have different types of influence. Gladwell notes three separate typologies: Mavens – taken from the Yiddish term *mevin* meaning understanding – who are known to be experts or connoisseurs across a wide range of subjects; Connectors – who have widely dispersed contacts and can thus move an idea from one world to another; and Salesmen – whose passion makes them persuasive in individual discussions. Of course whereas there are archetypes for each of these, the same traits can and do co-exist in the same individual.

Implicit in Gladwell's 'biography of an idea' is that much word of mouth is at an almost invisible level. Indeed the book's subheading – '*how little things can make a big difference*' – suggests that word of mouth's effectiveness lies in its very *ordinariness*.

One of the signature social experiments in this area is Stanley Milgram's^b 'six degrees of separation' work. Milgram's 1967 experiment involved recruiting a random sample of individuals on the west coast of the US and asked each of them to forward a package by mail to a personal contact of theirs who they thought would be able to forward it on (and so on) with the ultimate goal of getting the package to a named individual in Boston. The average number of steps was six – hence the name.

Whilst now familiar, this is a staggering finding and gave rise to the notion of the 'small world effect'. Duncan Watts and Steven Strogatz, two social scientists at Cornell University built a mathematical model to explain how such a small number might occur³. Their conclusion at the time (1998) was that a handful of people with very diverse friends could "short-circuit" an otherwise huge network of acquaintances.

However such "superconnectors" have been paradoxically elusive. Working with the 'six degrees of separation' concept, Duncan Watts replicated Milgram's research on a mass scale for the internet age. He built a sample of 60,000 people across 166 countries who were asked to forward an e-mail – again by personal contacts – to one of 18 designated target recipients. Not only did they identify that the majority of cases (still) required only 5-7 steps but that the message chains "did not rely on a few highly connected individuals"⁴.

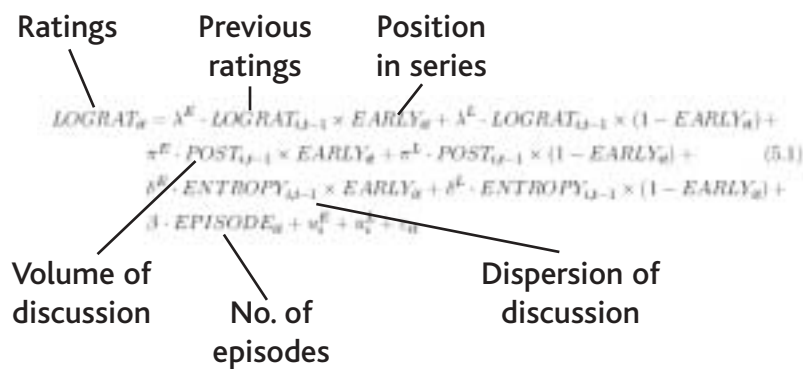
^b Milgram also conducted the infamous experiment into authority that involved making subjects they believe they were administering electric shocks of ever higher voltage to an unseen individual – actually an unwired actor – in an adjacent room, whose screams of protest also increased with the 'voltage'.

As with many such theories, the truth probably lies somewhere in the middle. In 2002 an innovative academic study into the effects of word of mouth for media was conducted by Mayzlin and Godes in the US taking the ratings success or otherwise of network TV series as the 'sales' object under scrutiny and compared this with the amount and nature of web chat-room discussions about the individual shows.

The team concluded that "conditional on overall *volume*, *higher* dispersion is more likely to lead to a broader set of conversations and thus sales."

A Current Perspective - Tense, Nervous Headache?

This sets up one of two fundamental tensions in word of mouth practice. The ideas expressed by Gladwell, Milgram and Rogers have an intuitive appeal. The concepts are readily graspable. But the technical practice – building a model of how such intuitive concepts can affect marketplace behaviour leads quickly to mathematics which is as dauntingly unapproachable as *The Tipping Point* is readable. Mayzlin and Godes' model extends to a dozen pages of formulae: just the summary is daunting enough (Fig 2.)⁵:
The second tension is between an ever-increasing understanding of the importance of word of mouth and



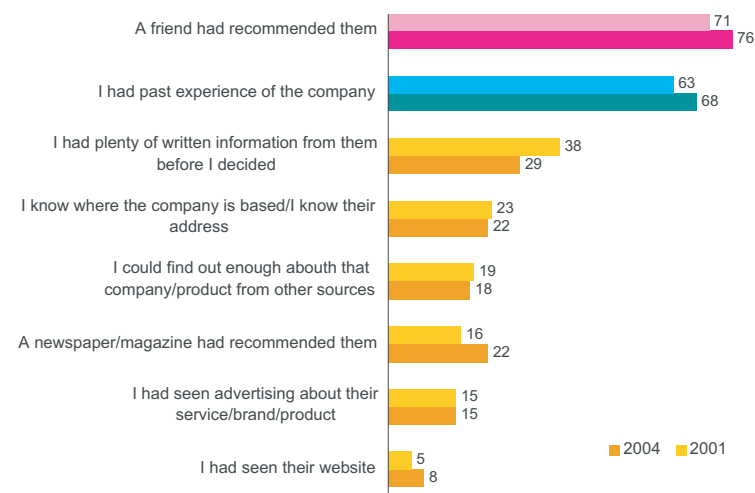
Model explaining ratings performance as a function of word of mouth and other parameters
Source: Mayzlin (Yale, MIT) and Godes (Harvard) 2002

the relatively low scale of the practical marketing response.

A study commissioned by the Royal Mail in 2001 asked consumers which of a range of information sources would make them 'more comfortable' with a product or service for a company. At the top of the list (71%) was a friend's recommendation, which eclipsed even their own past experience (63%) and dwarfed advertising (15%). MediaLab's updating of this study suggests that – if anything – word of mouth is now even more significant (76%) whilst advertising, together with other 'controllable' marketing channels, remains largely unchanged (Fig 3. below).

Little wonder, then, that nine out of ten taking part in a 2003 Marketing Society poll say they believe

Which 3 of the following would make you feel more comfortable about taking out a product or service with a company?



All Adult % figures
Source: BMRB Omnibus survey / Royal Mail April 2001 / MEC MediaLab 2004

traditional advertising's influence has diminished during the past five years and will continue to do so.⁶

What has arisen in the last few years is an attempt to drive word of mouth directly through a variety of tactics frequently labelled as 'buzz' or 'viral' marketing. These have enjoyed both success and failure. They are integral components of launches, particularly in markets such as films, where informed anticipation can be built prior to an identifiable and crucial launch date. Strategies here include seeding internet discussions amongst movie aficionados and preview screenings to a select few. Of course, the product needs to stand up to scrutiny amongst such 'opinion formers' and examples exist of poorer quality movies being previewed and the consequently negative word of mouth hastening the demise of box office post release.

Movies is one category where generating word of mouth about the product is relatively easy. Other strategies have instead focused not on product word of mouth but communications word of mouth. Again these have met with success and failure. The almost instantaneous post-deregulation success of the UK telephone directory enquiry service, 118118, owes much to an advertising led strategy that lent itself to creative expression across a range of channels. Less positive examples include the US launch of the Dr Pepper/Seven Up brand Raging Cow, a youth-targeted drink which covertly recruited web 'bloggers' to talk up its website. Once discovered, the strategy imploded. As one site-visitor wrote, "This website is FAKE. When you are advertising under false pretences and not being up front about what you're doing ... that isn't just wrong, it's immoral and disgusting."⁷

Moreover, regardless of success or failure, product or communications orientation, such viral strategies are defined by being small scale: as adjuncts or 'the interesting bit' of a campaign which enjoy disproportionate client interest but take only small levels of budget and limited consumer penetration in comparison to other channels.

Some fresh thinking is required.



"Word of mouth"

Where's Debbie? – The MediaLab Project

A Not So New Approach

We have used a simple, transferable methodology to research word of mouth. Applying this across a range of different categories and studies we aim to ease both of the 'tensions' identified above: first by making the intuitively accessible concepts associated with word of mouth practically accessible to consumer markets; second by looking at the drivers of word of mouth beyond the relatively niche confines of 'viral' channels

MediaLab's approach builds on a technique first used in 1994 by Ben Miled and Le Loaum in France⁸ and applied to media by Hachette Filipacchi, also in France in 2001⁹.

The methodology asks consumers four related questions about their discussion of an individual category:

1. In general, how often would you say you discuss <category> with other people? (5 point scale: never...very often)
2. Over the last six months, how many people would you say you have talked to about <category>? (4 point scale: no-one...many different people)
3. If someone were to ask your advice about <category>, how much information would you be able to give them? (5 point scale: none...a very large amount)
4. If talking to others about your preferred <category>, how likely is it that you would be able to convince them about your opinion? (5 point scale: unlikely...definitely)

The questions capture different elements of word of mouth. "How often" captures frequency and consequently also *volume* of discussion, whereas "how many" relates to *dispersion*. In combination they measure the physical activity of discussion about a category. The other two questions gather not *activity* but *content*. "How much information" implies more factual communication and "able to convince" implies subjects where communication is more likely to be an exchange of opinion. (Comparing the relationship within and between these two pairs allows us to map categories on two axes with four quadrants. This is instructive for characterising the *type* of word of mouth and is discussed in more detail in the appendix.)

There are several benefits to such an approach. The first is that it covers a range of the different qualitative aspects to word of mouth, thus not prejudicing the outcome. The second is that it's quick: perhaps 90 seconds of telephone interview time (and somewhat quicker face to face with prompt cards for the four or five answer scales). This makes it very high utility as it can be appended to other questionnaires at limited cost.^c

For application, however, it is useful to be able to describe not only the type of word of mouth but also *who* is active in discussion about a category. To do this we net down respondents answers to the four questions to a single definition of those word of mouth active, regardless of which combination of the four elements is driving this.^d

We call those who are active **Transmitters** and the remainder **Receivers**.

^c Cost may be driven either by incremental interview time or, where interview length is at a maximum practical level, by sacrificing similarly 'sized' questions in other areas.

^d The route to this is in three stages. The first stage is to allocate a weight to the individual responses to each of the four questions – very often at a higher 'score' than not very often and so on. The second stage is to add up individual respondent's scores. This produces a distribution of respondents scores which can be ranked from high to low. Finally we separate the top third of respondents from the bottom two thirds. This is an arbitrary but consistent split similar to standard definitions of "heavy users" for a category and has the advantage of protecting sample sizes to ensure validity of analysis.

A Not Insignificant Study

MediaLab's project has used this methodology with four different study types

- A stand alone quantitative study
 - * Designed to identify the extent to which word of mouth varies by category, whether it is different in nature by category and whether different individuals are transmitters by category
 - * 21 'categories' covering consumer categories and non-consumer areas such as "the environment" and "religion"
 - * 1000 sample
- Analysis of 12 separate categories using WPP's BrandZ study
 - * Designed to build up a picture of how transmitters relate to the category in use and attitudes
 - * BrandZ is WPP's proprietary study of consumer loyalty and attitudes using Millward Brown's BrandDynamics™ methodology
 - * Typical sample of 400 category users
- Analysis of 16 separate categories via a TGI re-contact study
 - * Designed to understand transmitters' lifestyles, attitudes and media consumption patterns
 - * Two separate samples of 2,000 TGI respondents were re-contacted with each sample asked about 8 categories
- Analysis of advertising awareness on two categories
 - * Pilot analysis to understand how transmitters respond to real-world marketing communications
 - * Collected via client-commissioned tracking studies
 - * One retail and one FMCG category

The BrandZ, TGI and ad-tracking components are effectively pre-existing studies to which our four questions have been added, but which are then fully available to be analysed according to the word of mouth questions. A list of the categories by methodology is in the appendix.

The combination powerfully allows us to answer the following questions:

- How does word of mouth differ in scale and nature across categories?
- Are *Transmitters* different people in different categories?
- How do *Transmitters* relate to the category?
 - * Use of brands?
 - * Attitudes to brands?
 - * Response to communications?
 - * Accessibility by channel?



Where's Debbie? – No Longer a Missing Person

A Single Definition – Transmitters

The different '4 question' characteristics of word of mouth are useful in understanding the type of discussions most readily open to influence and some of the inherent barriers on inertia that might exist. For example trying to generate wide and opinionated discussion for financial services – characterised by narrow and factual-based discussion - might be an extreme objective.

However, we need to know more than just what types of word of mouth is happening, we need also to know who is active – people we call transmitters.

Transmitters by Category – the Opinion Leader Myth

MediaLab's stand-alone study found that 86% of UK adults qualified as transmitters in at least one of the 21 categories surveyed. This gives the lie to the common notion that 'opinion leaders' or 'early adopters' are a single group. In practice this shouldn't be a surprise, since what makes you a transmitter in finance is unlikely to make you a transmitter in either food or fashion.

By like fashion, all of UK adults (a recorded 99%) are 'receivers' in at least one category.

Thus there's no such thing as 'early adopters' or 'opinion leaders' except where they are defined within a category.

Transmitters – Involved and Expert

Applying our Transmitter definition to a selection of BrandZ studies enables us to see how Transmitters relate to the category.

The findings are remarkably consistent across categories:

The first four of these characteristics justifies disproportionate focus in channel planning. Here is an audience of direct significance to a brand's success:

- Transmitters are **heavier users** of the category. It is not the case that all heavier users are transmitters, but an inherent bias does exist.
- Transmitters are **more aware** of brands. This is true at all levels of definition – spontaneous and prompted brand awareness extending to familiarity measure such as claiming to 'have heard a lot about'
- Transmitters **have used more brands**, equipping them to speak with greater relative authority. On balance they are not necessarily more loyal to any brand.
- Transmitters are relatively **more motivated by brand and less by price**, although a lower sensitivity to price does not mean that highly price-sensitive markets such as motor fuel become brand-only considerations for transmitters.

The second four characteristics are criteria for greater success on the basis of harnessing transmitters' preponderance for talking about the category: meet their more demanding needs and there is a very real prospect that word of mouth will generate a much greater indirect benefit:

- Transmitters express **stronger opinions**. They are simultaneously more positive and more negative in their perceptions of differentiation, quality and range, extending through to newer territories such as social responsibility. By contrast they are much less likely to give neutral or 'don't know' responses.
- Transmitters are **more demanding** of the category. Asked which attributes are important in determining brand choice, transmitters list more things than receivers - taking them well beyond the table-stakes.
- Transmitters have **differentiated needs**. It's not only the case that every potential attribute is more important, but that the rank order of importance changes.

- **Transmitters recommend.** As with other opinions, this cuts both ways – they are more likely to recommend both for and against individual brands.

The differentiated needs element is arguably the most significant finding. Most of the common characteristics are a reason to 'try harder' with transmitters. Differentiated needs provide the springboard for a differentiated approach and will also be most determined by the category. For example, one attribute disproportionately important to transmitters in the Electrical Retail category is the ability to 'offer impartial advice'. This is not top of the list for all consumers but might for transmitters be the lever that changes perception: the Tipping Point 'little thing' that 'makes a big difference' As a generic in-store offer this might be too expensive to implement at an effective level of quality, but would be achievable on a practical scale with internet or telephone helplines, or by sponsoring media advice sections.

Transmitters – Responsive to Communications

In the same way that an 'urban myth' of marketing suggests a single definition for opinion leaders, a related misconception is that those with peer to peer influence are impervious to anything but the most understated and tailored of communications.

In fact MediaLab's research suggests that far from being advertising aloof, transmitters respond positively across a range of communications channels.

- BrandZ research confirms that transmitters **value popularity**. Brand fame is an integral facet of their motivation, suggesting that broad-scale communications have a role.
- TGI data indicates that one of very few attitudinal consistencies of transmitters in different categories is in their **positive response to marketing**. Transmitters are more likely to:
 - * Think **TV ads are interesting** to talk about
 - * **Notice radio ads**
 - * **Notice press ads**
 - * Notice outdoor ads
 - * Claim that **ads 'help me choose'**
- This is not to say that they are somehow marketing groupies. They are **no less demanding** of advertising:
 - * They **expect ads to be entertaining**
 - * They are no less likely to **fast-forward through ads on video**
 - * They are just as likely to think that **lots of TV ads are devious**
- BrandZ and TGI data both demonstrate greater internet use
 - * **More online activities**
 - * More likely to go first to **the internet for information**
- Two pilot advertising-tracking studies with Transmitter classifications show:
 - * **Greater advertising awareness**
 - * **Greater awareness across all channels**
 - * **Greater depth of recall**

Transmitters – Accessible in Depth

At this point it will come as little surprise that transmitters' category involvement extends through to their consumption of media – where there is content which stimulates interest, there will transmitters also be. This works within channels as opposed to across them: holiday transmitters will seek out holiday programming as well as travel sections of newspapers and specialist magazines and websites.

Application - Marketing by Word of Mouth

MediaLab's research has demonstrated that Word of Mouth is neither inaccessible nor niche. On the contrary, it is readily within marketers' grasp as long as the following steps are made.

1. From Activity to Philosophy

'Viral marketing' essentially describes an activity: 'something you can do' to stimulate word of mouth. But it is abundantly clear that word of mouth is much bigger and much less containable than a set of activities.

Rather *everything you do* can be a driver of word of mouth, from product delivery to NPD to point of purchase to after-sales to communications.

This requires a change of mindset. Only by seeing every element of the mix as a potential driver for word of mouth can the mechanism be seen to its full extent.

2. From Philosophy to Practice

We have demonstrated that it is possible to identify transmitters by category; that they have both a direct importance to brand success and an indirect potential; that they have higher and differentiated needs; that they are accessible both across channels and in their responsiveness.

This suggests three non-exclusive routes.

- I. **Target transmitters** across communication channels. This gives an immediate effectiveness gain both directly and indirectly – use transmitters to reach everyone with greater impact.
- II. **Augment the message mix.** Transmitters make greater demands and have differentiated needs – so what might seem relatively unimportant against the broader audience might become disproportionately significant to transmitters. But their increased likelihood of consuming specialist media – whether on or offline – provides a range of opportunities for a deeper conversation.
- III. **Encourage engagement.** Transmitters are likely to engage with the fullest range of marketing channels – particularly those with a more direct involvement rather than passive receipt: interactive, event-based and experiential channels, promotions, samples, exclusives, care-lines, loyalty and member get member schemes, even viral techniques all have a potential role.

3. From Practice to Action

Three things to do immediately:

- I. **Review current word of mouth status.** Is word of mouth an activity or a philosophy?
- II. Review current research programmes. Transmitters are definable on almost any survey at limited cost. Augmenting research to allow this will lead you towards an understanding of how word of mouth is working for you now and how it can work harder.
- III. **Look for opportunities to focus on transmitters.** Targeting, augmenting the message mix and encouraging engagement are all valid routes.

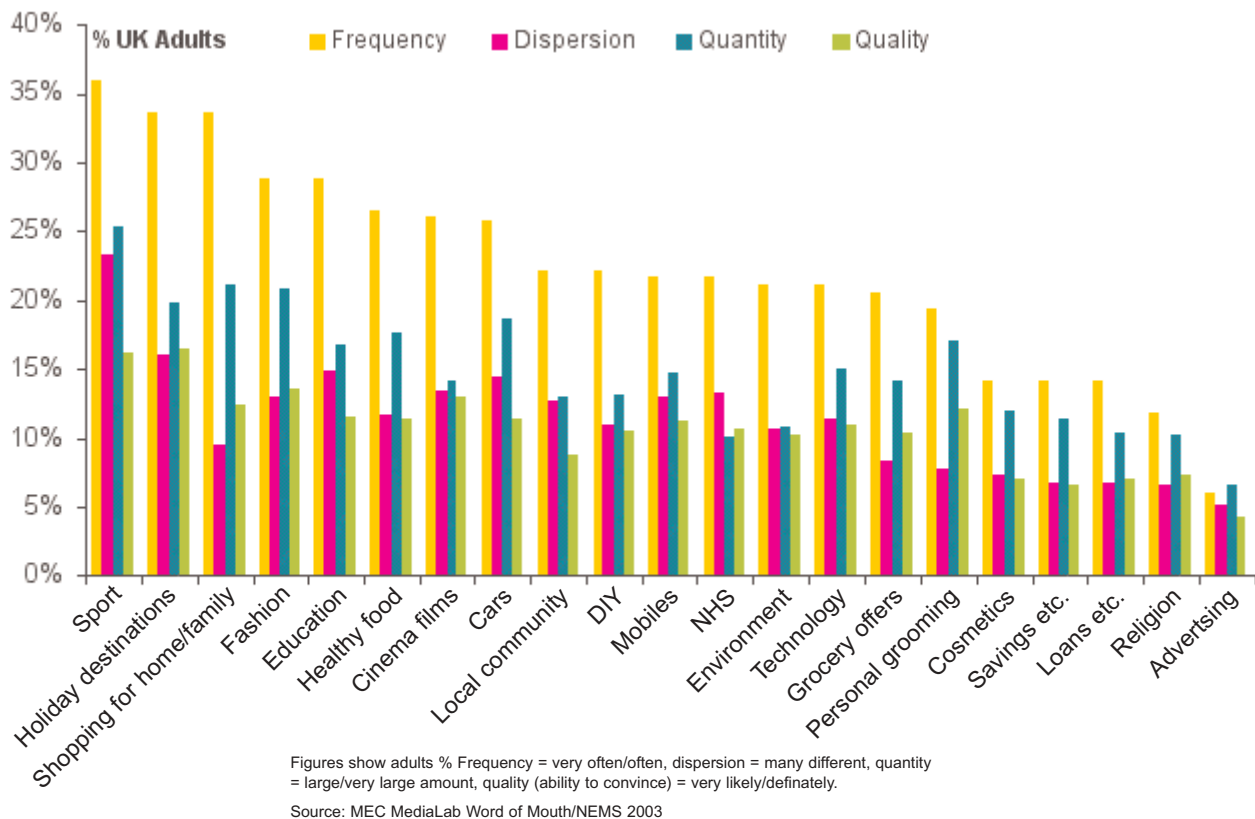


Appendices

How Word of Mouth Differs by Category

The stand-alone study provides a consistent view across 21 'categories' which allows us to see how both the extent and the shape of word of mouth differs.

Fig 4, below, shows the positive responses to the four questions for each of the 21 categories ranked in order of frequency of discussion.



It is immediately apparent that some things – notably sport, holiday destinations and shopping for the home or family, are significantly more discussed than personal loans, religion and advertising.

It is also apparent that the each of the four questions has a similar rank order across categories^e, although there are some subtle differences which deserve further exploration.

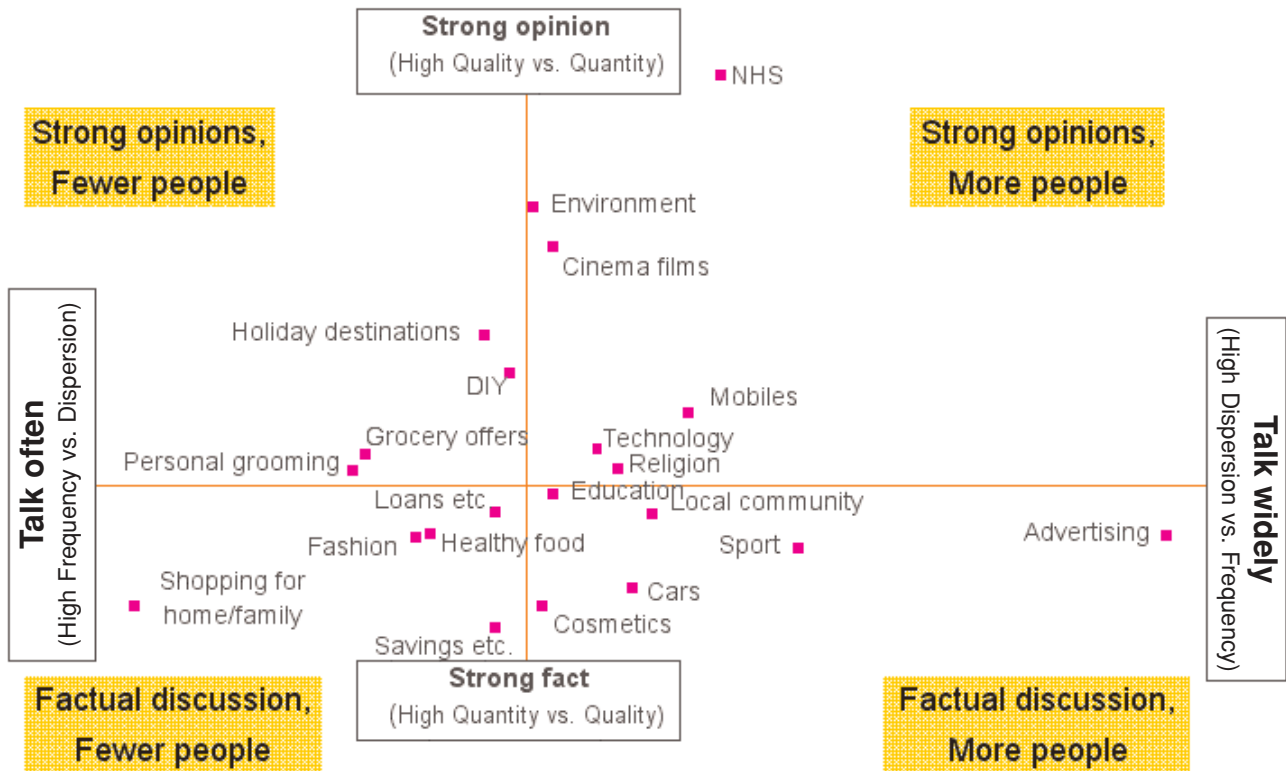
'Frequency' and 'dispersion' reflect different elements of word of mouth *activity*, whereas 'quantity' and 'quality' (ability to convince) reflect different emphases of content. Comparing the relationship within and between these two pairs allows us to map categories on two axes with four quadrants. This takes 'size' or the extent of word of mouth out of the mix thus allowing us to characterize the nature of word of mouth more easily.

Fig 5 shows this schematically. The horizontal axis shows activity with relatively more frequency than dispersion to the left and the opposite to the right. The vertical axis shows the relative

^e Indeed there is significant overlap between respondents answering positively to the four components within a category, which strengthens the validity of using analysis to net down the four questions to a single 'Transmitter' definition.

content dimensions of more ability to convince than quantity of information at the top and vice versa at the bottom. The four quadrants can then be defined by the two dimensions according to whether the subject material is more opinion-based vs. more factual and whether the discussion is likely to be with a wider or narrower circle.

Figure 5 also shows how the 21 categories in our stand-alone study fit into such a matrix, with the axes crossing at the 21 category average.



Source: MEC MediaLab Word of Mouth/NEMS 2003. Figures represent adults % Frequency = very often/often, dispersion = many different, quantity = large/very large amount, quality (ability to convince) = very likely/definitely.

The analysis demonstrates how subjects like cars and sport exist in a factual domain but are widely discussed, whereas financial services categories and healthy eating remain factual but are discussed with fewer, probably closer contacts.

More opinion-based categories might include political areas such as the environment or NHS as well as taste-based categories like films. These opinions might be widely shareable in comparison with similarly opinion-based but more personal areas such as preferred holiday destinations or personal grooming.

It is interesting to note that advertising is characterised by being the most widely dispersed subject relative to its (admittedly small) size. This fits with experience – most ad campaigns are not the subject of intense discussion, but an occasionally exceptional ad readily makes for water-cooler conversation.

Category Analysis

Categories analysed to date are as follows:

		Cross category survey	TGI recontact	Brandz
FMCG	Cosmetics	X		
	Cosmetics and beauty		X	X
	Personal grooming	X		
	Vitamins/mineral supplements		X	X
	Grocery offers/new products	X	X	
Retail	Electrical Retailers		X	X
	Furniture/Home Improvement		X	X
	Health & Beauty		X	X
	Supermarkets/Grocery		X	X
	Banks and Building Societies		X	X
Finance	Loans etc.	X		
	Savings etc.	X		
Durables/ Technology	IT Hardware		X	X
	Mobile phone networks		X	X
	Mobiles	X		
	Sportswear Technology	X	X	X
Motoring	Cars	X	X	X
	Luxury Cars		X	X
	Motor Fuel		X	X
Lifestyle	Cinema films	X	X	
	DIY	X		
	Fashion	X		
	Healthy food	X		
	Holiday destinations	X	X	
	Shopping for home/family	X		
	Sport	X		
Other	Advertising	X		
	Education	X		
	Environment	X		
	Local community	X		
	NHS	X		
	Religion	X		

More detail for individual categories may be available on request. It is also anticipated that the list of analysed categories will be extended during 2004.



"Word of mouth"

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